SCIENCE

FOREIGN AGRICULTURE

December 27, 1971

JAN 1972

Australia-New Zealand Meat Exports and Production

Portugal's Growing Feed Industry

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This week's cover:

Beef carcasses are inspected and branded at an export packing and freezing plant in Auckland, New Zealand. New Zealand's beef output for export will be up about 5 percent this year, and about 60 percent of shipments will go to the United States. For a detailed analysis of New Zealand and Australian beef production and foreign sales, see story beginning this page.

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Australia-New Zealand Production Establish

By SHACKFORD PITCHER
Livestock and Meat Products Division
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A second year of record beef and veal production is expected in Oceania during calendar 1971. This is being caused by raising slaughter cattle to heavier weights as well as slaughtering larger numbers. Herd expansion has been underway for several years, mainly in response to the strong world-wide export market.

Practically all Oceania beef cattle are grassfattened, and pasture conditions generally have been very good because of favorable weather conditions during the past year.

Oceania beef and veal exports through August 1971 were 11 percent above January-August 1970. Exports to the United States of 555 million pounds were up nearly 10 percent. Record quantities of meat have been shipped to Russia, following the large shipments in 1970—the first year Russia imported meat from this source. Russia currently is buying more mutton than beef, but

d Meat Exports, h Second Record

prospects for an important market for Oceania beef appear promising.

Australia and New Zealand account for nearly 60 percent of U.S. imports of beef and veal. Since both countries are free of foot-and-mouth disease, they are eligible to supply fresh and frozen meat, which several other important U.S. suppliers cannot do. For instance, Argentina, the third largest supplier in 1970, can export only processed meat, such as frozen cooked beef and canned corned beef, to the United States.

Most fresh and frozen beef, veal, mutton, and goat meat shipped to the United States is subject to the limitations of the Meat Import Law, P.L. 88–482. The United States imported nearly 1.2 billion pounds of meat under this law in 1970 and Australia and New Zealand supplied 69 percent.

A voluntary restraint program was in effect during 1970 whereby the principal suppliers of P.L. 88–482 meat made commitments through bilateral agreements to control shipments of meat so that U.S. imports would not exceed specified amounts from each country. A similar program is now in effect.

Under the Federal Meat Inspection Act, countries exporting meat to the United States must have a meat inspection system equal to the U.S. system. Personnel from the Consumer and Marketing Service's Meat and Poultry Inspection Program also make periodic supervisory inspections of all establishments certified eligible to export meat to the United States.

This year, for the first time, supervisory veterinarians have been posted permanently in major supplying countries. One veterinarian took up duties in New Zealand in May and two were posted in Australia by September.

This year also, further improvements have been made in shipping through the use of large containers. Several ships specially built for handling containers have been put into service and loading facilities have been installed.

Containerized shipping of meat permits greater flexibility and faster service. For example, when containers reach a U.S. port, the meat can be unloaded immediately as with conventional shipments, or the containers can be delivered directly to the buyer. Import meat inspection personnel can inspect the shipment near the arrival port or at a distant inland point.

A new container ship that went into service on the Oceania-east coast U.S. run during the summer of 1971 can be loaded or unloaded in as little as 1 to 2 days, compared with 2 weeks for a conventional ship. This ship is capable of carrying 560 refrigerated containers with a total capacity of 20 million pounds of frozen meat.

Australia.—Beef production is concentrated in eastern and southern Australia. There is little seasonal variation in output in the temperate areas of Victoria and New South Wales. Queensland, on the other hand, has a more pronounced seasonal output, with production peaking during May-July and falling off after September.

Australian beef and veal output during the first 9 months of 1971, at 1.86 billion pounds, was nearly 8 percent above the same period of 1970. The production increase, however, was not spread evenly throughout the period. Output was off 4 percent in February because of excessive rainfall which disrupted marketings of slaughter cattle. Slaughter recovered sharply in March only to steady off in April. It has increased monthly since then. The rainfall in February generally was very beneficial because it broke the drought in Queensland. Traditionally, Queensland has been Australia's largest beef-producing and exporting State, shipping a greater percentage of its output than any other State. However, it now appears that 1971 production in Victoria will surpass that of Queensland.

Australian exports of beef and veal during January-August 1971 totaled 573 million pounds—4.6 percent above a year earlier. The United States took 64 percent, with direct shipments about 10 million pounds above those of a year ago. Exports to Japan, at 53 million pounds, were double those of a year earlier and U.K. shipments were up.

Again in 1971, Russia has been a major outlet for Australian meat. However, beef and veal shipments of 46 million pounds were nearly 11 million below those of 1970, while mutton exports of over 60 million pounds were more than double the shipments of

Above, workers bone carcasses at an Australian abattoir where cattle are killed and exported as meat—mainly to the United States. Left, USDA inspector (center) at a plant which ships meat to the United States.

a year earlier. Australia's January-August 1971 meat exports to Russia were 34 percent above those of the same period in 1970.

The Australian Meat Board coordinates export shipments of meat to the United States, relying on a diversification program which requires exporters to earn entitlements by shipping to other destinations. At the beginning of 1971, an exporter earned U.S. entitlements for beef and veal at the rate of 1.5 tons for each ton shipped elsewhere. The rate was revised upward to 1.75 tons in May and suspended completely in June when it became necessary to lift restraints on exports to the United States to permit maximum shipments prior to the October 1 dock strike deadline at east coast and Gulf ports. In 1970, 84 percent of the direct shipments went to these ports, compared with only 16 percent to the west coast and Hawaii.

Australia's meat exports during the early part of 1971 were influenced by exporters' decisions to ship large quantities to the United Kingdom where returns appeared attractive for earning U.S. entitlements expected to be needed later in the year.

However, meat supplies in Queensland were smaller than anticipated and some exporters were concentrating on filling their orders for Russia. This led to a reduction in exports to the United States through May and the eventual lifting of restraints in June. The dockworkers' strike on the west coast caused further disruption. Shipments caught by the strike had to be delivered to Canadian or Mexican ports to be unloaded and transshipped to their original destinations; new shipments were discontinued. The west coast dockworkers returned to their jobs in early October under the Taft-Hartley Act.

By the end of September, U.S. imports of Australian meat subject to the Meat Import Law totaled 396 million pounds—66 million less than the same period in 1970. Not all the Australian meat scheduled for September arrival was unloaded prior to the dock strike. A few vessels were diverted to Canadian ports for unloading, while others may have to wait out the strike.

New Zealand.—Beef and veal production for export during the 1970–71 slaughter season was running 0.6 percent above a year earlier through August with only 1 month left of the season. Total production during calendar 1971 also is expected to be slightly above 1970. Much of New Zealand's beef comes from the slaughter of cull dairy cows and bulls. Production from specialized beef breeds is growing in importance, but still accounts for only 25 percent of total output.

A production increase for export of at least 5 percent had been forecast for the 1970–71 season, based on greater cow slaughter and an additional meat supply resulting from the New Zealand dairy-beef diversification scheme.

This scheme, which was introduced in 1969, offered dairy farmers financial incentives to divert grass from dairy to meat production by retaining dairy calves and raising them to heavier slaughter weights. During 1969 and 1970, 423,000 calves were registered under the scheme.

This program was terminated in July 1971, however, because the outlook for dairy product exports improved and milk production had been affected by unprecedented droughts in the country's major dairying areas.

USDA veterinarian (right), on permanent duty in Australia, inspects cattle before slaughter for U.S. export.

Fewer dairy-beef calves than had been expected became available for export slaughter during the 1970-71 season. Apparently it is taking longer than predicted to bring these animals to optimum slaughter weight. Therefore, the increased beef production forecast for last season did not materialize, but should come about during 1971-72.

The unexpected improvement in the outlook for dairy products also caused dairy farmers to retain more cows. Sheep farmers, too, expanded beef breeding herds because of the continued depressed markets for wool.

Despite the disappointing increase in production, New Zealand's beef and veal exports during January-August, at 312 million pounds, were 25 percent higher than those of the same period a year earlier. Shipments to the United States accounted for 60 percent of the total, compared with 58 percent in 1970. Canada was the second most important destination during both years, but 1971 exports of 50 million pounds were off 9 million. Exports to other major destinations, such as the United Kingdom, the USSR, and Japan, all were up in 1971.

The New Zealand Meat Board controls beef and veal shipments to the United States by setting the proportion that each export establishment can slaughter for sale to the United States. The proportion was increased during July for the third time in 1971 because production fell short of earlier estimates. The formula effective July 1 provided as eligible for shipment to the U.S. market a total of 71 percent of the manufacturing beef output, 18 percent of the primal cuts, and all the veal output. After the July increase, it was thought that many of the export plants would be shipping their entire kill to the United States to the season's end.

This action was prompted by the Meat Board's desire to see exporters ship the bulk of New Zealand's commitment for U.S. arrival before October 1 in anticipation of the longshoremen's strike on the east coast and Gulf ports.

These ports normally account for 73 percent of New Zealand's shipments to the United States. U.S. imports of meat from New Zealand subject to P.L. 88–482 during January-September 1971 totaled 193 million pounds, 15 percent more than in the same period of 1970.

Lisbon marketwoman displays poultry parts. Growing Portuguese poultry consumption has increased mixed feed use.

Bigger Meat, Poultry Uses Spur Growth Of Portugal's Feed Industry

By FORD M. MILAM
U.S. Agricultural Attaché
and CARLOS VIEIRA
Reporting Assistant, Lisbon

Spurred by a rising gross national product and per capita income, Portuguese consumers are eating more protein in the form of beef, poultry, swine, and lamb. As a result, there has been an upsurge in the production of meats and a rise in mixed feed output.

With more money to spend, the Portuguese have increased their per capita consumption of red meat from 35 pounds to 66 pounds between 1960 and 1970, and their intake of poultry meat from 2.9 pounds to 13.2 pounds in the same period.

An indirect beneficiary of these changes in consumption patterns could be the U.S. farmer; yellow corn from the United States and Argentina and U.S. soybean meal are important components of Portuguese mixed feeds.

In the past 3 years, Portugal's mixed feed output and consumption have increased by more than 57 percent—from 796,000 tons in 1969 to an estimated 1.3 million tons in 1971. The outturn of poultry, swine, and cattle feed each increased by more than 50 percent during this period.

Use of mixed feed by the swine industry is expected to increase by 114,000 tons between 1970 and 1971, but this rate of increase may taper off in the near future.

The swine industry is producing at peak capacity, following scattered outbreaks of African swine fever in 1970, which caused hog numbers to decline. As a result, total hog offerings for slaughter were markedly reduced, causing a drastic increase in pork prices.

If hog prices remain at their present high levels, producers can be expected to accelerate herd rebuilding, and mixed feed production will benefit.

Portuguese beef and dairy producers are using larger quantities of mixed feed than in past years with most of the increase being utilized by the beef industry. Total consumption of mixed feed by these segments of the farm economy is expected to reach 378,000 tons in 1971, 96,000 tons more than the year previous.

Demand for poultry meat and eggs has spurred the Portuguese poultry industry to increase its production. Meat output climbed by nearly one-third between 1964 and 1970 to 53,000 tons, and egg production also increased nearly one-third in the same period to some 43,000 tons.

The industry's rise in production has, in turn, increased its use of mixed feed. In 1969, poultry farmers used 280,000 tons of mixed feeds. In 1971, they are expected to feed an estimated 424,000 tons, a 51-percent climb.

Portugal has about 80 mixed feed mills, ranging in yearly production capacity from 1,000 tons to 120,000 tons. In 1970, nine of these produced more than 50 percent of the country's total mixed feed output.

In future years, many of the smaller mills will probably go out of business because of their inability to compete in a market where the economies of large-scale production will mean the difference between survival and failure.

In most years, Portugal grows sufficient oats and rye to meet the needs of the mixed feed industry, but must import small quantities of barley. Corn imports are sizable, averaging 377,000 tons a year in the 3-year period—1968-69 to 1970-71.

During the first 7 months of 1971, Portugal imported from the United States some 200,000 tons of corn valued at $12 million and over 33,000 tons of soybeans, valued at $4 million. In 1970, Portuguese corn purchases from the United States totaled 262,000 tons.

In part, Portuguese imports of mixed feed ingredients have been stimulated by market development programs cosponsored since 1960 by the U.S. Department of Agriculture's Foreign Agricultural Service and various producer groups.

In 1971, the U.S. Feed Grains Council, American Soybean Association, and National Renderers Association cooperated with FAS in a highly successful U.S. exhibit at the Eighth National Agricultural Fair at Santarém, and at Braga. The purpose of the exhibit was to show the advantages to be derived by Portuguese producers from the use of high-energy U.S. feedstuffs and poultry breeding stock.

Future prospects for the Portuguese mixed feed industry are good. More people are moving to industrial areas to earn higher incomes. With more money to spend for food, consumers are expected to continue to accelerate their demands for beef, dairy products, broilers, eggs, and pork—all of which require large quantities of mixed feed.

The United States will probably supply the major share of these feed ingredients in future years, a share which could grow as Portugal's livestock and poultry industries continue to expand to meet the country's meat needs.

PLUM ISLAND L
GUARDS U. S. L

In the last few decades, rapidly expanding world trade has multiplied the dangers of worldwide epidemics of animal diseases. Huge international shipments of livestock and meats, as well as faster air transportation of both animals and people, have facilitated the spread of infectious organisms.

The danger of livestock epidemics has also been inflated by the spread of little-known diseases beyond their isolated breeding grounds. Some, like African swine fever, were virtually unknown outside Africa until recent years, and diagnostic tests have only just been developed.

If the international trade of livestock and meat is to continue at its current rate of development, prevention of animal diseases is of prime importance. The U.S. Department of Agriculture has safeguarded American flocks and herds through a program of early detection, quarantine, and slaughter of infected animals.

USDA's "alarm system" is the Plum Island Animal Disease Laboratory, located on an isolated island in Long Island Sound. Dedicated in 1956, the laboratory originally diagnosed and studied cases of foot-and-mouth disease; since then, it has developed diagnostic tests for 17 other animal diseases alien to the United States.

About half of the laboratory's work consists of diagnosis. When any U.S. veterinarian suspects an animal of having an exotic, or foreign, disease, he can send a blood sample to Plum Island for a quick diagnosis.

Since the accurate detection of animal diseases is so vitally important, the laboratory has devised sophisticated diagnostic tests. Plum Island scientists recently developed a faster, more sensitive method of detecting foot-and-mouth disease virus. They also created the first diagnostic test for African swine fever—the most deadly of hog diseases—which previously could not be distinguished from hog cholera.

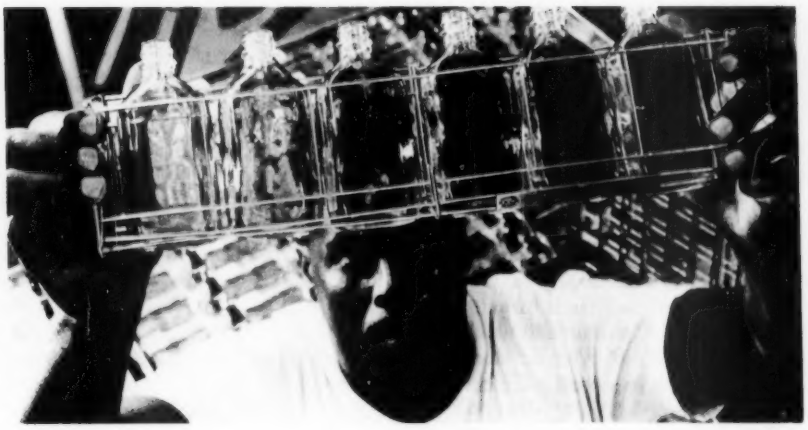
Demands for diagnostic tests have increased substantially in the past decade. Only 34 samples were submitted for testing in 1961; during the first 10 months of 1971, well over 2,000 samples were tested. Fortunately, no cases of alien diseases were found.

To keep pace with the growing demands for detection, the laboratory has increased its diagnostic capabilities in order to meet an emergency situation. For example, if an outbreak of African swine fever should occur in the United States, Plum Island's technicians could test up to 300 samples each day.

The laboratory also trains field veterinarians from throughout the United States. In 1971, more than 70 veterinarians and other scientists were trained to recognize and diagnose several exotic animal diseases.

Besides diagnostic services, the laboratory does extensive research in animal diseases, especially foot-and-mouth disease (FMD). Plum Island's scientists have uncovered several new facts about FMD, including one which has influenced U.S. import laws: FMD virus can survive up to 50 days in wet, salt-cured meat. Following this discovery, U.S. import laws were amended to ban imports of certain types of cured meats from countries where FMD is endemic.

The laboratory has elaborate security measures to assure that no diseases escape from the island. Only the laboratory's 330 personnel and a few author-



Top, left to right: scientist collects blood from an infected steer; technicians prepare cultures; technician checks virus growth in cultures. Bottom, diagnostic test for suspected infection of African swine fever.

D LABORATORY
S. LIVESTOCK

ized visitors are allowed on the island. The only transportation to the island is a ferry and several light boats which are operated by the laboratory. Guards constantly patrol the island to warn away boats which might attempt to land.

All persons entering research buildings are required to change into laboratory clothing. Another change of clothing is required to enter the animal isolation or laboratory areas; leaving these areas requires a shower and yet another change of clothing. Some personnel who pass between several laboratory areas each day may be required to shower and change clothes as many as 20 times.

All animals enter the island through a safety barrier at the dock. Livestock are sprayed for parasites and quarantined on the island before they are allowed to enter the laboratory through hermetically sealed airlocks.

Once an animal arrives on the island, it is not allowed to leave: when it dies, its carcass will be burned to a fine ash and buried on the island. Solid animal wastes are also burned to a fine ash, while liquid wastes are sterilized by heating.

Animal feeds are especially fumigated to kill any pests. All equipment entering the laboratory passes through airlocks. Once equipment is used up or no longer useful, it is either burned or blasted with superheated steam, crushed, and buried.

The laboratory's ventilation system features a "negative air flow" which draws air from less contaminated areas to more contaminated areas, thus assuring that airborne diseases cannot escape. All air from the laboratory is finally strained through special deep-bed filters, which stop organisms as small as a virus.

The laboratory is designed to be as independent as possible: it includes a power plant, an incinerator, a laundry, and a sewage treatment plant. The laboratory also breeds many test animals, including 630,000 white mice each year.

Swine and cattle used in experiments are purchased from closed herds of private breeders: buying animals from one herd insures the uniformity needed for laboratory work.

These extraordinary precautions reflect the emphasis which the laboratory places on protecting U.S. livestock from alien diseases—both those housed on Plum Island and those which threaten to invade the United States from their overseas breeding grounds.

Farmers' Banks in the Netherlands Now Serving Many Nonfarm Needs

Dutch agricultural banks, the main supply of credit for the country's farmers, have gradually expanded their services to include the nonagricultural sector, and are taking other steps to strengthen their positions. An example of this is the merger, now in progress, between the Cooperative Central Raiffeisen Banks at Utrecht and the Cooperative Central Boerenleen Bank at Eindhoven.

The result will be an organization with a balance-sheet total of more than $5.5 billion, making the new bank one of the largest in the Netherlands and 47th on the world list of banks.

Agricultural credit banks date back to the 1890's. Dutch agriculture had gone through a serious crisis in the late 1800's and a Government commission reported that one of the main obstacles holding back full development of the country's agricultural sector was lack of adequate credit facilities for farmers.

Commercial banks were unable to meet the highly decentralized and fluctuating credit requirements of agriculture, so the Commission recommended the establishment of credit cooperatives. As a result, the first farmers' credit bank was established in the Netherlands

(*Continued on page 16*)

Austria Imports 23 Percent More U.S. Agricultural Products in 1971

Austrian purchases of U.S. farm products scored an impressive 23-percent increase in fiscal 1971 as compared with fiscal 1970. Increased shipments of grains, oilseeds and products, and fruits and vegetables were largely responsible for the increase. Shipments of unmanufactured tobacco, traditionally the largest U.S. export to Austria, declined enough to put it in second place behind oilseeds and products.

Calculated at the current rate of exchange (following Austria's revaluation of the schilling during the year) U.S. sales of farm goods reached $27 million in fiscal 1971. This represented 5.6 percent of the Austrian market for these products compared to 5.2 percent a year earlier. This can also be compared with the 4 percent of the market that the United States had as recently as calendar 1969.

Because of Austria's location in the heart of Europe a large part of bulk goods is transshipped from other locations, Germany in particular. Thus, many products of U.S. origin are disguised as imports from other countries. This is particularly true since many bulk commodities from the United States are processed further in Germany before being sent on to Austria.

Austria is a difficult market for U.S. agriculture to penetrate for several reasons. Austrian imports of farm goods include a large amount of fresh fruits and vegetables which traditionally come from nearby East European markets because of transportation savings. Other important Austrain imports are high-value items such as spices, tea, coffee, cocoa, cheeses, etc., which the United States either does not produce or cannot market in competition with other suppliers.

At present, 74 percent of Austria's agricultural imports are bulk commodities, and the best opportunities for increased U.S. sales will probably continue to be in this area although promotional activities might result in greater sales of consumer-oriented products. Of the major bulk commodities, U.S. sales of soybean meal and corn have shown the greatest gains. Corn has shown a remarkable rate of growth, although representing a small total volume. U.S. corn sales increased 841 percent from 1969 to 1970 to reach a total of $446,000 in 1970.

Presently untapped sales potential may exist for such U.S. commodities as raw cotton, crude vegetable oils, coarse grains, and deep-frozen chicken. Development of these exports depends on the future ability of the U.S. commodities to compete in price.

—Based on a dispatch by
JAMES F. LANKFORD
U.S. Agricultural Attaché
Vienna

President Nixon Approves Eximbank Credit For Sales Of U.S. Goods to Romania

President Nixon has cleared the way for the Export-Import Bank to finance sales to Romania. As a result of this November 30 action, Romania becomes the first Communist country, except Yugoslavia, eligible for Eximbank credit in the last 4 years.

No significant increase in U.S. farm exports to Romania is expected since many of the products sent there are already eligible for CCC credit. However, this decision could be the first step in extending Eximbank credit to other Communist countries.

Feed Exporter Wins "E-Star" Award

The I. S. Joseph Co. of Minneapolis —one of the nation's largest exporters of agricultural byproduct feeds—was recently awarded the Presidential "E-Star" award for export achievement. This is the second "E" award received by the company.

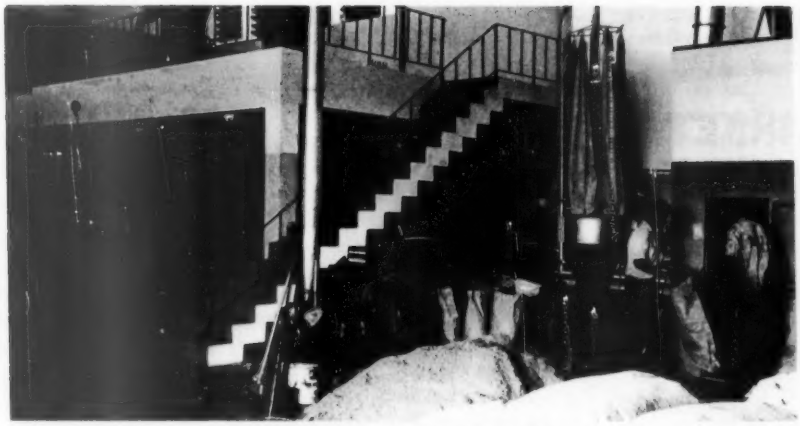
The most recent presentation—made in Tampa, Florida, in mid-December—recognizes the firm's activities in the creation of new European and Japanese markets for a new product—citrus pulp pellets. The I. S. Joseph Company's first "E" award in 1966 resulted from its achievements in pelleting and marketing sugarbeet pulp for export to Europe. Both citrus and sugarbeet pulp pellets are used as livestock feed ingredients.

To introduce citrus pulp pellets overseas, the I. S. Joseph Company engaged in market research, market development, and building a source of raw materials. The firm erected storage, processing, and loading facilities on the Tampa docks.

The company also engaged in extensive educational programs in foreign countries to promote sales of the citrus pulp pellets. As a result, exports from the Tampa plant climbed from 4,500 tons in 1967 to 95,000 tons in 1970-71 with most of the shipments going to European Community countries.

The I. S. Joseph Company's Florida plant has three production lines which operates on a 24-hour basis during the peak citrus season and can produce 350-400 tons of pellets daily.

President of I. S. Joseph Co. with pelletized citrus pulp in hand.



Cooperative Cotia plant makes chicken feed to sell to members.

Co-op Cotia: Aiding Brazil's Agriculture for 43 Years

In December 1927, a group of Japanese farmers who had settled near Cotia, in the State of São Paulo, formed a cooperative to solve some of the problems connected with growing and marketing potatoes. Today, after 43 years, the organization, now known as Agricultural Cooperative of Cotia-Central Cooperative (CAC-CC), is still serving its farmer members and is responsible for many of the advances made by Brazilian agriculture during that time.

Generally accepted as one of the most proficient organizations of its kind in Brazil, CAC-CC provides its members with technical assistance, agricultural chemicals, seeds and seedlings, packing materials, agricultural implements, and consumer goods.

It receives, processes, sorts, grades, and stores members' crops until they are sold. CAC-CC also serves as a domestic and export marketing agent for members' products, and imports supplies to meet their needs.

To eliminate their dependence on potatoes as a single crop, CAC-CC began early to encourage its members to diversify. As a result, Brazil's Japanese co-op members were the first to produce rice, tea, peppermint, Japanese tangerines, silk, and several new vegetables in the State of São Paulo.

As the co-op grew—from 83 members in 1927 to over 10,000 in 1970—so did its communication difficulties. In order to keep in closer touch with members and to be aware of their needs and wants, particularly in the production and marketing areas, the co-op, in 1950, established a unique system of product committees called Local Groups of Producers (GP's).

In time, GP's were set up for each of the 12 major product lines of the cooperative—potatoes, poultry and eggs, fruits and vegetables, coffee, cotton, rice and cereals, peanuts, tea, bananas, alfalfa, vegetable oils, and ramie.

Originally, the local GP's functioned as advisory committees, but their activities were limited to their geographic areas. As the association became larger and more complex, it established 12 GP's at headquarters level, one for each product line. These worked with their respective local GP's and served as advisory committees to the general board of directors.

The marketing of members' crops is one of the cooperative's most important activities. During 1970, CAC-CC marketed over 100 commodities valued at about $67 million, 78 percent of the association's total business, which has soared from $2,100 in 1928 to $85.7 million in 1970.

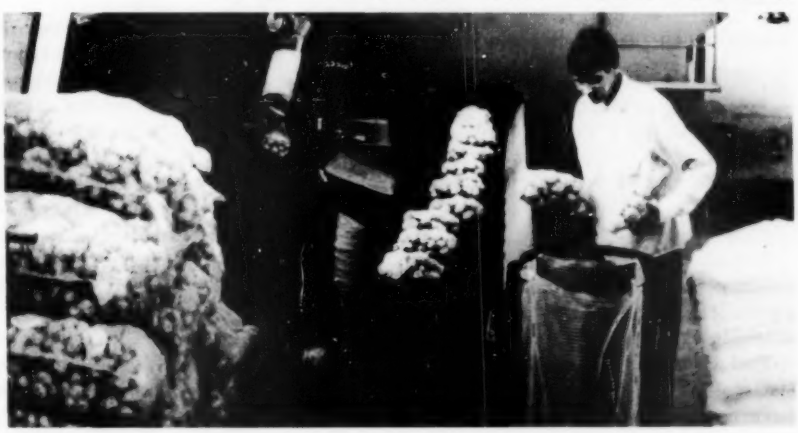
The selling of vegetables is still the most important business effort of the association, accounting for 29 percent of all products marketed in 1970. However, over the past decade their sale has decreased in relative importance and eggs and poultry have gained—going from 16 percent of total sales in 1961 to 28 percent in 1970.

The co-op not only serves as selling agent for the members, it also acts as a supplier for many farm necessities. Mixed feeds and fertilizers are the two most important single items CAC-CC provides to its members. Each accounts for more than 25 percent of its annual farm supply business.

The co-op started selling fertilizer to its members because of high prices

(*Continued on page 16*)

Members' potatoes are repacked for sale to public by cooperative.



Based on the publication "Cooperative Cotia—A Force for Development in Brazil" by Henry W. Bradford, Farmer Cooperative Service, U.S. Department of Agriculture. This report is scheduled for publication in early 1972. Inquiries may be addressed to Farmer Cooperative Service, USDA, Washington, D.C. 20250.

CROPS AND MARKETS

GRAINS, FEEDS, PULSES, AND SEEDS

Rotterdam Grain Prices and Levies

Current offer prices for imported grain at Rotterdam, the Netherlands, compared with a week earlier and a year ago:

Item	Dec 22	Change from previous week	A year ago
	Dol. per bu.	*Cents per bu.*	*Dol. per bu.*
Wheat:			
Canadian No. 1 CWRS-14. .	2.01	0	[1] 2.06
USSR SKS-14	1.89	0	2.04
Australian FAQ	1.66	0	1.87
U.S. No. 2 Dark Northern Spring:			
14 percent	1.92	—1	2.08
15 percent	([2])	([2])	2.11
U.S. No. 2 Hard Winter:			
13.5 percent	1.80	0	1.96
No. 3 Hard Amber Durum..	1.83	+2	2.01
Argentine	1.84	0	([2])
U.S. No. 2 Soft Red Winter..	1.74	0	1.86
Feedgrains:			
U.S. No. 3 Yellow corn	1.45	—1	1.78
Argentine Plate corn	1.59	+3	1.97
U.S. No. 2 sorghum	1.54	+7	1.64
Argentine-Granifero sorghum	1.56	+8	1.66
U.S. No. 3 Feed barley	1.30	+4	1.55
Soybeans:			
U.S. No. 2 Yellow	3.43	+1	3.28
EC import levies:			
Wheat [3]	[4] 1.59	+2	1.36
Corn [5]	[4] 1.08	+4	.67
Sorghum [5]	[4] .97	—3	.70

[1] Manitoba No. 2. [2] Not quoted. [3] Durum has a separate levy. [4] Effective October 14, 1971, validity of licenses with levies fixed in advance is a maximum of 30 days. [5] Until Aug. 1, 1972, Italian levies are 19 cents a bu. lower than those of other EC countries. Note: Basis—30- to 60-day delivery.

Spanish Imports of U.S. Pulses Reach 7,900 Tons in 1970-71

Total Spanish imports of pulses (mainly chickpeas, dry beans, lentils, dry peas, and dry broad beans) reached a record level of 59,700 metric tons in 1970-71, up almost 14 percent from the previous year. This increase enabled the United States to double its share of Spain's pea and lentil imports—from 3,400 tons in 1969-70 to 7,900 tons in 1970-71.

Spanish production of edible pulses has been declining in recent years. Output is estimated at approximately 365,000 metric tons in 1971-72, 8 percent less than the 397,000-ton output in 1970-71, and 12 percent below the 1967-69 average.

The drop is attributable primarily to outbreaks of brown leaf spot—a chickpea disease occurring in Spain—and rising labor costs. There has also been a decline in acreage.

Although consumption of pulses as food is declining, the Spanish feed increased quantities to livestock in times of feed shortages—as during the 1970 drought. The downward trend in human consumption of pulses is further aggravated by high prices on the retail market.

Argentina Sells 200,000 Tons of Wheat to Brazil

Argentina and Brazil, under the 3-year agreement signed earlier, have fixed the quantity of wheat Brazil will take during the first quarter of 1972 at 200,000 metric tons. Shipments will be 60,000 tons in January and 70,000 tons during February and March.

Shipments are expected to total 1 million tons in 1972 unless arrangements are altered prior to February 15 because of supply conditions.

Argentina To Increase Rice Area in 1971-72

The area sown to rice this season in Argentina is estimated at 92,800 hectares (229,308 acres), which is 14.3 percent above last year's area. These larger sowings were encouraged by the attractive prices obtained last year.

Increased sales from Argentina were the chief reason for the 45,000-ton reduction in commercial U.S. rice export sales in 1970 from 1969.

COTTON

U.S. Cotton Prices Advance Sharply

A strong advance for U.S. cotton quotations in the Liverpool market in late November has eliminated the favorable price position which U.S. cotton was enjoying in Liverpool during recent months.

The abrupt price rise appears to have been spurred initially by reports of low fiber strength in Texas, as indicated by micronaire readings of new-crop cotton (mainly short-staple upland) being harvested on the Texas High Plains. The Texas harvest in this area has been considerably delayed by late spring planting and by cool weather, rain, and snow during the harvesting season—all of which can affect the degree of fiber maturity attained before the first killing frost. Much of the Texas crop had not yet been harvested as of early December.

The closure of Pakistani ports because of the Indo-Pakistani war and European difficulty in obtaining Turkish cotton under earlier contracts have stimulated increased demand for cotton in a period of very tight world supply. Both U.S. and foreign

cotton prices have reacted in a strong upward movement.

A relatively low level of world cotton production during the past two seasons and very low world stocks have spurred a fairly constant price rise for both U.S. and foreign cotton since mid-1970, turning into sharp price increases during the spring and summer of 1971. Throughout the first 7 months of 1971, U.S. cotton quotations in Liverpool (especially those for Strict Middling 1-1/16-inch) were almost consistently above quotations for comparable foreign growths. The U.S. dollar float on August 15, however, considerably improved the competitive position of U.S. upland cotton in Liverpool relative to equivalent foreign quotations. Prices for longer staple upland (SM 1-1/16-inch) and shorter staple (Middling 1-inch) alike fell 1.75 cents per pound following the float.

Quotations for U.S. SM 1-1/16-inch, for example, had averaged 1.3 cents per pound above the Liverpool Index for the 4 weeks before the float, but they averaged ¾ cent below the Index for 7 weeks after the float. (The Liverpool Index is an average of the six cheapest of the Liverpool quotations for 12 SM 1-1/16-inch growths.)

During October and early November the price margin in favor of U.S. SM 1-1/16-inch cotton fell to almost ⅓ cent, as revised crop estimates reduced the U.S. production outlook and dock strikes hampered export shipments. A U.S. price rise of almost 2 cents per pound in late November and early December, compared with a rise of less than 1 cent for the Index, completely erased the former price margin in favor of the United States, raising the quotation for this quality to well above its peak level prior to the float. The price of U.S. SM 1-1/16-inch cotton in Liverpool for the week ending December 9 was 38 cents per pound—a full 7½ cents above the U.S. quotation a year ago and comparable to the record high of December 1967. The price for U.S. M 1-inch was 36.75 cents per pound, compared with 27.75 a year earlier and a peak 29.83 in late December 1967.

FATS, OILS, AND OILSEEDS

Oilseed and Meal Imports Of Major Markets Down

Imports of oilseeds and meal into eight major importing countries—Japan, West Germany, the Netherlands, France, Italy, Denmark, Spain, and the United Kingdom—during January-July 1971 totaled 9.73 million metric tons soybean meal equivalent, or 1 percent below the volume for the same 7 months in 1970.

This decline contrasts sharply with the 13.8-percent growth of a year ago. It is believed to reflect readjustments in livestock and poultry production.

Despite the overall decline in imports of oilseeds and meals, imports of soybeans and meal—largely from the United States and Brazil—were 5 percent above the large 1970 volume. Imports of soybeans and meal during January-July this year accounted for a record 64.7 percent of the total against 61.0 percent in the 1970 period and only 53.5 percent in all of 1969. Growth in imports of soybeans and meal appears to be taking up much of the slack from reduced imports of fishmeal, peanuts, and peanut meal.

Imports of rapeseed, although relatively small, were up sharply, reflecting record availabilities, largely from Canada. However, it is not clear to what extent rapeseed meal is competitive with soybean meal in foreign markets.

In 1971, imports of oilseeds and meals have been below trend and their total may be down from that of 1970. In 1972, imports seem likely to continue below trend, but some increase is anticipated above the 1971 volume. Meal prices in 1972 are expected to continue strong, chiefly reflecting tight supplies.

OILSEED AND MEAL IMPORTS INTO MAJOR MARKETS[1]

Kind	1969	1970	Jan.-July 1969	Jan.-July 1970	Jan.-July 1971
	1,000 metric tons	*1,000 metric tons*	*1,000 metric tons*	*1,000 metric tons*	*1,000 metric tons*
Soybeans & meal	7,983	10,258	4,420	5,992	6,298
Fishmeal	2,344	1,974	1,520	1,251	894
Peanuts & meal	1,368	1,355	908	805	628
Rapeseed & meal	471	432	254	191	340
Other oilseeds & meal	2,755	2,852	1,529	1,581	1,568
Total	14,921	16,871	8,631	9,820	9,728
	Per-cent	*Per-cent*	*Per-cent*	*Per-cent*	*Per-cent*
Soybeans and meal as proportion of total	53.5	60.8	51.2	61.0	64.7

[1] Japan, West Germany, the Netherlands, France, Italy, Denmark, Spain, and the United Kingdom.

SUGAR AND TROPICAL PRODUCTS

Thailand Expects Record Sugar Output

Thailand is forecast to produce a record output of 650,000 metric tons of centrifugal sugar, raw value, in 1971-72, an increase of 22 percent over 1970-71. The higher production will result from an expansion in sugarcane acreage.

Thailand's sugar production has almost tripled in the last 5 years, prompting it to seek additional export markets. Earlier this year, it withdrew from the International Sugar Agreement (ISA) in order to achieve this goal. Thailand felt that its ISA quota, 36,000 tons, was too low. It participates in the U. S. sugar program with a quota for 1972, currently set at 16,637 tons (18,339 short tons). Sugar exports totaled 56,200 tons in 1970-71, the largest portion going to Japan. This year exports are forecast considerably higher, possibly 200,000 tons.

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Correction: In issue of December 20, 1971, page 4, table on Canadian rapeseed exports, years should be 1962 through 1970.

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It imported seed potatoes for its members because domestic seed potatoes were of poor quality. Through this initiative, CAC-CC is largely credited with saving the potato industry in São Paulo.

CAC-CC provides several other categories of assistance to its members. Technical services are available from staff agronomists, animal and poultry technicians, and veterinarians.

The cooperative operates five experimental farms in Sao Paulo and Parana where it conducts experiments and research and produces breeding stock, hatching eggs, and seeds. Among these are a tomato farm, a large farm for reforestation and production of breeding hogs, a farm for growing coffee, rice, corn, peanuts, soybeans, and cotton, and farms producing hatching eggs and poultry breeding stock.

Initially, the cooperative provided credit to its producer members. However, when the 1967 cooperative law prohibited cooperatives from conducting credit activities, co-op members organized a separate credit cooperative —CAC Regional Cooperative of Rural Credit, Ltd.—which began operation in July 1969.

Brazil's cooperative law also limits the operations of co-ops in other ways. Where restrictions exist, CAC-CC provides services to its members by leasing facilities, or in some instances, by organizing separate corporations to perform functions forbidden to co-ops.

One of the latter organizations formed by CAC-CC is the Company for Developing Agric-Industries (CODAI), formed in 1965. Similar to a holding company, its primary function is to raise capital to invest in its own plants or in other firms in order to further CAC-CC purposes and objectives.

By April 1969 CODAI had accumulated about $1.2 million which it invested in two large, modern vegetable oil plants and in a modern poultry processing plant, all three solely owned by CODAI and in eight other commercial firms. All of these provide processing or other services to CAC-CC members, as well as to other customers.

Netherlands Farm Banks (Continued from page 7)

in 1896. By the 1930's the number of such banks approached 1,300.

Only 2 years after the founding of the country's first cooperative bank, the Raiffeisen and the Boerenleen cooperatives decided to establish their own central banks.

A central bank acts as a clearing house for local banks, as a "banker's bank." Its primary role is to supervise the activities of local banks, to advise them, and to help them maintain a state of liquidity.

Increased prosperity and altered economic and social patterns have helped to change the nature of farmers' cooperative banks. Urbanization of the countryside and the opening of bank branches in population centers led to a shift in the composition of the banks' clientele. Where for many decades lending was mainly directed toward agriculture, these new conditions brought about an increase in the significance of nonagricultural loans.

In 1959, for example, loans by all Dutch farmers' cooperative banks totaled $615 million. Of this amount, $355 million, or 58 percent, was devoted to agricultural loans; $260 million, or 42 percent, was employed for nonagricultural-sector projects. A decade later, total loans had grown to $3.3 billion, and although total agricultural loans had grown to $1.5 billion, the percentage of farm loans had dropped to 44. The other 56 percent, amounting to $1.8 billion, was used for nonagricultural purposes.

As a result of this switch, agricultural credit banks have developed into diversified banking institutions.

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